

West Northamptonshire Council

Pension Fund Committee

29/3/2023

Mark Whitby – Head of Pensions

Report Title	Northamptonshire Pension Fund – Communications strategy
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Contributors/Checkers/Approvers

MO	Sarah Hall on behalf of Catherine Whitehead	21/3/2023
S151	James Smith on behalf of Martin Henry	7/3/2023
Head of Pensions	Mark Whitby	24/2/2023

List of appendices

Appendix 1 – Communications strategy

Appendix 2 – Communications plan

Appendix 3 – Website review update

1. Purpose of report

- 1.1 To seek approval from the Pension Fund Committee for the communications strategy, communications plan and website review project for 2023.

2. Executive summary

- 2.1 This report is asking for approval for the communications strategy, communications plan, and website review project for 2023.
- 2.2 Our communications strategy has been updated to reflect current membership and employer numbers, to include a new section on lifestyle communications, and to reflect technological updates on our methods of communication.
- 2.3 Our communications plan will focus on our key projects like McCloud, the pensions dashboard and our website review in addition to statutory communications and promotion of the online pension account for members.
- 2.4 From the research we conducted in our website review we've agreed to focus on restructuring the content of the website.
- Testing a personalised approach with different search and navigation options.
 - Creating prototypes and testing with members, employers, and the Pensions team.

3 Recommendations

- 3.1 The Pension Committee is asked to:
- a) approve the Communication Strategy (see section 5.1)
 - b) approve the Communication Plan (see section 5.2)
 - c) note the work being undertaken on the website development review (see section 5.3)

4 Report background

- 4.1 Regulation 61 of the Local Government Pension Scheme Regulations 2013 state that an administering authority must prepare, maintain and publish a written statement setting out its policy concerning communications with members and scheme employers.
- 4.2 Our communications strategy has been updated for 2023 and outlines our strategic approach to communications. It can be found in appendix 1. Our communications plan for 2023/24 details the communications activities to be undertaken within the scheme year and can be found in appendix 2.
- 4.3 The Committee previously approved a review of the Fund’s website. Officers have worked with the West Northamptonshire Council Digital team to carry out a user led review of the website. An update on the project and final recommendations for improvement are provided within this report.
- 4.4 This report was reviewed by the Local Pension Board, and they identified no substantive changes.

5 Issues and choices

5.1 Communication Strategy

- 5.1.1 We’ve made the following changes to our communications strategy for 2023 in appendix 1:
- 5.1.2 Introduction – the number of employers has been updated from 321 to 319 and members from over 62,000 to over 76,000. The reason for the increase in members is because we have included those members that are classed as ‘undecided leavers’ in the ‘deferred member’ category to be consistent with the annual report and accounts, whereas in the previous strategy these members were left out.
- 5.1.3 The members per category were updated as follows:

Category	Previous strategy	2023 communications strategy
Active members	21,916	24,055
Deferred members	23,917	34,759
Pensioner members	17,057	17,705

- 5.1.4 We added a new section on lifestyle communications to reflect how we're trying to make our communications more engaging by linking them around different life events, like getting married, moving in with a partner, starting a family, buying their first home, or getting a promotion.
- 5.1.5 We added a new section on performance indicators which we plan to benchmark against other Funds once this information becomes available. The key information that we are monitoring is the proportion of members that have registered for their online pension account and the proportion of members that have opted out of electronic communications.
- 5.1.6 Under methods of communication we removed references to Skype as this is no longer used and added in videos and MS Teams.

5.2 Communication Plan

- 5.2.1 Our communications plan included as appendix 2 outlines our planned communication activities for 2023/24, on a monthly basis, for each of our stakeholders.
- 5.2.2 The communications plan shows the completion of our valuation activities, communication for key projects like McCloud and the pensions dashboard and our focus around increasing engagement about pensions in general by supporting activities like Pensions Awareness Week and the Pension Attention campaign.
- 5.2.3 It also includes the implementation phase of our website project.
- 5.2.4 The plan also includes timings for issuing statutory communications and cyclical newsletters, surveys, and employer training.

5.3 Website review

- 5.3.1 Our website review project (see appendix 3 for more detail) aims to determine whether our member and employer websites still meet the best user needs and will give recommendations on how to improve, move or replace both sites. We've held detailed interviews with members and employers to highlight any issues with the websites' navigation and surveyed over 1,700 people to find out what members and employers most wanted to know about pensions.
- 5.3.2 From the findings we've agreed to focus on restructuring the content of the website.
- Testing a personalised approach with different search and navigation options.
 - Creating prototypes and testing with members, employers, and the Pensions team.

6 Implications (including financial implications)

6.1 Resources and Financial

- 6.1.1 There are no direct finance and resourcing implications of the communications plan in general. Ongoing communication costs are picked up in the administration budget. The cost of any communications activities connected with the business plan activities will be included with the costings in the business plan.
- 6.1.2 Our drive to increase electronic communications should save costs in the long term.
- 6.1.3 A £60k budget has been requested in the business plan to replace both member and employer websites, with £30k to be financed by Northamptonshire Pension Fund.

6.2 Legal

6.2.1 Not applicable.

6.3 Risk

6.3.1 We are required by legislation to prepare, maintain and publish a written statement setting out our policy concerning communications with members and scheme employers.

The mitigated risks associated with this report has been captured in the Fund's risk register as detailed below -

Risk No.	Risk	Residual risk rating
7	Information may not be provided to stakeholders as required.	Green
17	Failure to administer the scheme in line with regulations and guidance	Green

6.3.2 The Fund's full risk register can be found on the Fund's website at the following link:
[Northamptonshire Risk Register](#)

6.4 Relevant Pension Fund objectives

6.4.1 The following objectives have been considered in this report:

- To promote the scheme as a valuable benefit.
- To deliver consistent plain English communications to stakeholders.
- To provide scheme members with up to date information about the scheme in order that they can make informed decisions about their benefits.
- To seek and review regular feedback from all stakeholders and use the feedback appropriately to shape the administration of the Fund.

6.5 Consultation

6.5.1 Not applicable.